

File 7

University of Calgary
Correspondence with Chief Electoral Office

7-1
February 17, 2012

Via Courier

Attn: Brian Fjeldheim
Elections Alberta
Chief Electoral Office
100, 11510 Kingsway NW
Edmonton, Alberta
T5G 2Y5

Direct line
+1 403.267.8292

Our reference
283818

Email
clarke.hunter@nortonrose.com

Dear Mr. Fjeldheim:

Re: Provincial Fund-Raising Functions and Provincial Political Contributions

Further to my telephone advice to you earlier today, the materials enclosed herewith are in response to your letter of January 13, 2012 to the University of Calgary, addressed to Douglas Black as the Chair of its Board of Governors, and copied to Dr. Elizabeth Cannon as its President and Vice-Chancellor. A copy of these materials was e-mailed to you on Friday afternoon.

As you know from the telephone conversation which Pat Peacock and the writer had with you on February 15, I represent the University and Mr. Peacock represents the law firm of Fraser Milner Casgrain and one of its partners, Joe Lougheed.

We advised you in that call that the University would in the near future be providing you with materials for your evaluation in connection with the investigation which has been reported in the media. Fraser Milner Casgrain and Mr. Lougheed have concurred that these materials should be made available for your review.

You will note that the materials consist of a volume of University records, as well as a statement which has been provided by Mr. Lougheed to the University. We are forwarding the latter as part of the package on the basis that it is additional information which has been provided to the University, but it is a statement of Mr. Lougheed rather than of any University official.

We look forward to hearing from you should you have questions concerning the materials.

Sincerely,

Norton Rose Canada LLP

Clarke Hunter, Q.C.

WCH/rfm

Enclosures

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283318/1204140v1

Response to the University of Calgary Enquiry

Joe Loughhead, Partner, FMC Calgary

February 15, 2012

Fraser Milner Casgrain LLP (FMC) – University of Calgary Provision of Services

The University of Calgary has been a long-standing client of Fraser Milner Casgrain LLP (FMC). Starting in about 2005, I provided government relations work for the University, in addition to our other legal services to the University. Our primary contacts at the University were Mr. Roman Cooney leading the University's external relations department during that time, as well as s. 17(1) who worked with Mr. Cooney on the government relations file, and the University General Counsel Ms. Barry-Hollowell at that time. My services were billed to the University of Calgary's general counsel. My billing practices for government relations work included a combination of billing for specifically identified discrete services, as well as general services related to different legal counsel activities. The University of Calgary was billed for my government relations services largely on an annual basis.

Effective June 15, 2008, FMC and the University of Calgary entered into a formal retainer agreement for government relations and community relations advice. Our subsequent billings were carried out in accordance with that agreement. The monthly retainer fee was at the amount of \$5,000 – \$60,000 per annum. The agreement lasted for one year, after which it was mutually terminated given the changed focus of the University of Calgary with regard to its government relations and other priorities, following the departure of Mr. Cooney.

Premier's Dinner

As part of FMC's overall marketing initiatives, the firm purchased tables for the Premier's dinner in 2006, 2007, 2008, and possibly in 2005 and 2009. At these events, we invited a number of our clients, including representatives of the University of Calgary, to be our guests. Our clients view events, such as this, as being beneficial to their organizations. This practice was consistent with FMC's marketing activities at that time. The purchase of the tables was borne by FMC. No clients were charged for the cost of their tickets to these events.

Discussion of the 2008 Account

Following the new General Counsel joining the University of Calgary, the University requested clarification of FMC's March 2008 invoice. I was intending to explain that the March invoice was not related to the reimbursement of the cost of the tickets to the Premier's Dinner, but was related to my services for government relations work. In the context of the overall relationship with the University of Calgary, FMC wrote off its March 2008 invoice at the request of the University of Calgary's general counsel.

My poorly drafted email of August 13, 2008 would have created some confusion, in particular, the phrase "then simply charge for an equivalent amount of my time." As mentioned earlier, I had intended to explain that the March invoice was related to government relations, and the cost of the tickets to the Premier's Dinner was not charged to the University of Calgary.

Without the full knowledge of all the facts and the context, I recognize this situation might have given rise to questions. However, at no time was I billing for services not requested by, and provided to, the University of Calgary. I have always sought to conduct myself with honour and integrity and to serve my clients and my community as best I can. At no time did I or FMC act on behalf of the University of Calgary as an agent to facilitate political donations.

Charlene Anderson

From: Lougheed, Joseph [Joseph.Lougheed@FMC-Law.com]
Sent: Wednesday, August 13, 2008 1:21 PM
To: Charlene Anderson
Cc: Anagnostakos, Leah; S.17
Subject: March FMC Bill I; Roman Cooney

Charlene, your office is questioning a bill issued on March 31 and \$4500 in my time re: U of C "Assist S.17 re: Government Relations matters".

You know that in June I was retained by External Relations to provide some GR advice. I bill Roman for that directly. The above is NOT part of that.

The bill in question relates to the Premier's Dinner. As the U of C is precluded from buying the table directly, we buy the table for the U of C write off the disbursement and then simply charge for an equivalent amount of time. This is a practice which we have followed for a couple of years now. This is the first time this has been questioned by you.

If Legal Services does not want to pay this that is fine - I understand your budget is tight, but it is separate and apart from my normal retainer for GR matters. If S.17 and Roman wish to have this come out of their budget vs. you in yours I leave that to you as a group to decide. I will simply move the time (\$4500) over and add it to the next GR bill.

Let me know if you have any questions and / or how you would like me to proceed.

Hope all is well,

JOE

Charlene Anderson

not responsive

----- Original Message -----

Subject: Re: March FMC Bill

Date: Mon, 18 Aug 2008 14:27:32 -0600

From: Charlene Anderson <cande@ucalgary.ca>

Organization: UofC

To: Loughheed, Joseph <Joseph.Loughheed@FMC-Law.com>

References:

<6D5F09482106DC43800FF44C1142EEDF0695118A@WESTEXCH01.calgary.lawfirm>

Joe, I will follow up with Roman and **S.17** privately regarding these emails but I am concerned that your email left the impression that my interpretation was 'splitting hairs'. Your initial email below was clear that you were buying a table on our behalf b/c we were prevented from doing so and that you would bill us an equivalent amt as 'fees' in exchange for this table. You were not billing us for your time. I have reviewed the Elections Finances and Contribution Disclosure Act which specifically prohibits the University from contributing funds to a party or candidate (set out below). This Act also prohibits another entity from making these contributions on our behalf. In addition, CRA also has prohibitions. So I stand by my very real concern that this practice is illegal and is unacceptable.

Prohibition

s. 16. No prohibited corporation, person normally resident outside Alberta or trade union or employee organization other than a trade union or employee organization as defined in this Act shall make any contributions to a registered party, registered constituency association or registered candidate.

(1) "prohibited corporation" means

(v) a public post-secondary institution under the /Post-secondary Learning Act/,

Contributions not belonging to contributor

34*(1)* Subject to section 26, no person, corporation, trade union or employee organization shall contribute to any registered party, registered constituency association or registered candidate funds not actually belonging to that person, corporation, trade union or employee organization, or any funds that have been given or furnished to the person, corporation, trade union or employee organization by any persons or groups of persons or by a corporation, trade union or employee organization for the purpose of making a contribution of those funds to that registered party, registered constituency association or registered candidate.

Offences by corporations, etc.

49*(1)* A corporation, trade union, employee organization or prohibited corporation that contravenes this Act is guilty of an offence and liable to a fine of not more than \$10 000.

Lougheed, Joseph wrote:

>Thanks for your views on this Charlene. I do not think it is fair to
>say services were and are not rendered; I am at the event every year and
>at the functions the come before and after it. This time is beneficial
>to the University's overall relationship with the Government and in the
>introductions made.

>
>In any event, I do not want to split hairs nor debate the issue, but I
>respect your views. Roman and I shall deal with this.

>
>Have a good weekend.

>
>JOE

>-----Original Message-----

>From: Charlene Anderson [mailto:carde@ucalgary.ca]

>Sent: Thursday, August 14, 2008 1:25 PM

>To: Lougheed, Joseph

>Cc: Anagnostakos, Leah; **S.17** Roman Cooney

>Subject: Re: March FMC Bill

>
>Joe, I think there may have been some confusion about the accounts, as I

>
>had thought this March acct had been dealt with some time ago. You are
>correct that this is the first time this 'practice' has been questioned
>by me. However, I questioned (and objected to) it, the moment I became
>aware of it. I cannot pay this account nor can I condone this practice.

>
>This practice, in my opinion, exposes the University to unnecessary
>risks - legally, financially and reputationally. The University cannot
>pay for services that were not rendered, nor should we circumvent the
>rules that preclude us from buying a table. I will leave it up to you
>and Roman to resolve this. tx

>
>Lougheed, Joseph wrote:

>

>

>

>>Charlene, your office is questioning a bill issued on March 31 and

>>

>>

>>\$4500

>

>

>>in my time re: U of C "Assist **S.17** re: Government Relations

>>matters".

>>

>>You know that in June I was retained by External Relations to provide

>>some GR advice. I bill Roman for that directly. The above is NOT part
 >>of that.
 >>
 >>The bill in question relates to the Premier's Dinner. As the U of C is
 >>precluded from buying the table directly, we buy the table for the U of
 >>C write off the disbursement and then simply charge for an equivalent
 >>amount of time. This is a practice which we have followed for a couple
 >>of years now. This is the first time this has been questioned by you.
 >>
 >>If Legal Services does not want to pay this that is fine - I understand
 >>your budget is tight, but it is separate and apart from my normal
 >>retainer for GR matters. If 5.17 and Roman wish to have this come out
 >>of their budget vs. you in yours I leave that to you as a group to
 >>decide. I will simply move the time (\$4500) over and add it to the
 >>
 >>
 >next
 >
 >
 >>GR bill.
 >>
 >>Let me know if you have any questions and / or how you would like me to
 >>proceed.
 >>
 >>Hope all is well,
 >>
 >>JOE
 >>
 >>
 >>
 >>
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 >
 >

--
 Charlene Anderson
 General Counsel
 University Legal Services
 Tel: (403) 220-2557
 Fax: (403) 210-9635

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--
 Charlene Anderson

7-8

General Counsel
University Legal Services
Tel: (403) 220-2557
Fax: (403) 210-9635

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7.9

FRASER MILNER CASGRAIN LLP

March 31, 2008

University of Calgary
2500 University Drive NW
University Legal Services Department
Calgary, AB T2N 1N4

Attention: General Counsel

Invoice Number : 2578338

Re: General Matters

Our File:

*being written off**S -**Can you ask
FMC to bill**5.17**directly for
Govt relations matters
Then submit other
+ 7 for
part*STATEMENT OF ACCOUNT

TO PROFESSIONAL SERVICES RENDERED in connection with the above noted matter:

nlr

07/03/08 J.P. Loughheed

9.00 Assist. *5.17* regarding various Government relations matters;*nlr*

	Hours	Rate	Fees
J.P. Loughheed	9.00	436.89	

nlr

PROFESSIONAL FEES

nlr

Invoice: 2530776
Page: 2



7-11

FRASER MILNER CASGRAIN ^{LLP}

n/r

27/08/07 J.P. Lougheed

6.00 Discussions and assistance to Mr. Cooney and **5.17**
various matters regarding Alberta
Advanced Education;

n/r

n/r

Invoice: 2530776

Page: 4



7.12

FRASER MILNER CASGRAIN L

n/r

	Hours	Rate	Fees
J.P. Loughheed		382.50	

n/r

7.13



FRASER MILNER CASGRAIN LLP

February 28, 2007

University of Calgary
2500 University Drive NW
University Legal Services Department
Calgary, AB T2N 1N4

Attention: General Counsel

EDMONTON
VOUCHER 70 3636

Invoice Number : 2481370

Re: General Matters

Our File:

STATEMENT OF ACCOUNT

8-144573

TO PROFESSIONAL SERVICES RENDERED in connection with the above noted matter:

nlr

28/02/07 J.P. Loughheed

10.00 Telephone conference calls with General Counsel;
meeting regarding Government of Alberta
strategies;

	Hours	Rate	Fees
J.P. Loughheed		382.50	

nlr

7-14



FRASER MILNER CASGRAIN LLP

March 6, 2006

University of Calgary
2500 University Drive NW
University Legal Services Department
Calgary, AB T2N 1N4

Attention: General Counsel

Invoice Number : 2400782

Re: General Matters

Our File:

STATEMENT OF ACCOUNT

TO PROFESSIONAL SERVICES RENDERED in connection with the above noted matter:

n/r

7.15

Invoice: 2400782

Page: 2



FRASER MILNER CASGRAIN LLP

n/r

22/02/06 J.P. Loughheed 6.00 Government relations issues as discussed with Ms. Barry-Hollowell;

23/02/06 J.P. Loughheed 2.00 Government relating issues as discussed with Ms. Barry-Hollowell;

	Hours	Rate	Fees
J.P. Loughheed		340.00	

n/r

n/r



7-16

FRASER MILNER CASGRAIN LLP

September 9, 2005

University of Calgary
2500 University Drive NW
University Legal Services Department
Calgary, AB T2N 1N4

3278
29548

Attention: General Counsel

Invoice Number : 2357463

Re: General Matters

Our File:

STATEMENT OF ACCOUNT

TO PROFESSIONAL SERVICES RENDERED in connection with the above noted matter:

nlr

12/08/05 J.P. Lougheed

3:00 Assistance regarding Government Relations issue;
telephone conferences regarding Government
Relations and all related correspondence;

nlr

Invoice: 2357463

Page: 2



7.17

FRASER MILNER CASGRAIN LLP

	Hours	Rate	Fees
J.P. Lougheed		340.00	
TOTAL)

7-18

From: Roman Cooney <rcooney@ucalgary.ca>
Sent: Wednesday, September 22, 2004 5:21 PM
To: Kerry Moynihan
Subject: Re: Policies

Well, I go.

I'm not sure what the question is. We go to lots of political events (dinners, fundraisers, golf tournaments) because it's important to be seen in the community and it presents opportunities for us to (gently) make our case.

If you mean is it OK to be there as an individual (i.e. because of a personal interest in the party) we don't have any policies against that as long as people don't bring their personal interests to the office or use it as part of their university decision-making. I'd be uncomfortable suggesting that anyone should or should not be part of a political or any other activity, as long as it doesn't bring the University into disrepute. They shouldn't join the Klan, for example.

Hope that helps - call me if I've missed it.

Regards,
Roman

Kerry Moynihan wrote:

> Hi Roman :

>

> Does the U of C have any policies that cover College Staff attending political events, ie The Premier's dinner?

>

> Thanks in advance.

>

> Kerry T. Moynihan

> Director of Marketing & Government Relations Office of Advancement

> Olds College 4500-50th Street Olds, Alberta T4H 1R6 office telephone

> 403-507-7710 office fax 403-556-4704 home telephone 403-271-0910 cell

> telephone 403-710-3858 e mail kmoynihan@oldscollege.ca

> www.oldscollege.ca

7-19

From: Roman Cooney [rcooney@ucalgary.ca]
Sent: Thursday, September 23, 2004 8:38 AM
Subject: [Fwd: Harvey Cenaiko Fundraiser]
Attachments: Harvey Cenaiko Fundraiser (200 KB)

yes to this one
rc

7.20

From: Barb Sturdy [bsturdy@shaw.ca]
Sent: Wednesday, September 22, 2004 9:17 PM
To: bsturdy@shaw.ca
Subject: Harvey Cenaiko Fundraiser
Attachments: Harvey Cenaiko Fundraiser Notice.pdf

This is our pre-election fundraiser, we would really appreciate your attendance and support.

Thanks.

Alberta

7.21



Harvey Cenaiko, MLA Calgary Buffalo,

cordially invites you to

*The Calgary Buffalo PC Association
Chinese Cultural Fundraiser and Silent Auction
at*

*Treasures of China Restaurant
(130 3rd Avenue S.E., Calgary)*

September 30, 2004, 5:30 P.M.

Guest speaker

Hon. Gary Mar, Minister of Health and Wellness

Ticket Price: \$75 each (\$50 tax receipt will be issued)

*To order tickets by credit card or cheque (payable to Calgary Buffalo PC Association), please call
Randy Blott at
(403) 244-3166*

Order your tickets early as seating is limited

7.22

From: Donna Mastel [mastel@ucalgary.ca]
Sent: Monday, April 18, 2005 5:10 PM
To: Harvey Weingarten; Roman Cooney
Subject: Premier's Dinner

Just heard from Jennifer Diakiw that it looks like Greg Melchin will be at our table on Thursday night. Great news for us --- now let's hope that changes aren't made before Thursday evening.
Donna

--

Donna Mastel
Director, Government Relations
Office of External Relations
University of Calgary
Administration Building 113
2500 University Drive, N.W.
Calgary, Alberta
T2N 1N4

Phone: (403) 220-8567
Fax: (403) 220-1312
e-mail: mastel@ucalgary.ca

Fresh. Innovative. Inviting. Discover the people, the research, and the news that make the University of Calgary what it is in U - the university's new flagship magazine, launching April 29.

7.23

From: Fitzgerald, Laura (Canada) [Laura.Fitzgerald@Pfizer.com]
Sent: Tuesday, February 07, 2006 4:11 PM
To: Roman Cooney
Subject: RE: Calgary Premier's Dinner
Attachments: Pfizer Submission to GoA Dec 05.pdf

Roman:

Thanks for the feedback. Sorry you won't be able to join us.

Fyi, I will likely bring in Pfizer's President - Jean Michel Halfon - in the next couple of months.

Non-responsive

A

Non-responsive

Take care,
Laura

-----Original Message-----

From: Roman Cooney [mailto:rcooney@ucalgary.ca]
Sent: February 6, 2006 4:37 PM
To: Fitzgerald, Laura (Canada)
Subject: RE: Calgary Premier's Dinner

Laura --

Alas, I'm sure you'd make better company but we're buying a table and I'm expected to sit at it, oddly enough. Hope to see you there.

Roman

-----Original Message-----

From: Fitzgerald, Laura (Canada) [mailto:Laura.Fitzgerald@Pfizer.com]
Sent: Thursday, February 02, 2006 3:24 PM
To: rcooney@ucalgary.ca
Subject: Calgary Premier's Dinner

Dear Roman:

I was wondering if you would like to join me @ the Pfizer table during the Calgary Premier's Dinner on April 20, 2006?

Warmest regards,

7.24

Laura
Pfizer

Sent from Laura Fitzgerald's BlackBerry Wireless Handheld

Severed under s. 17(1) and 17 (4)(g)

Included in the original disclosure package to Chief Electoral Office but ultimately determined to relate to personal expenditures

7-26

From: McKenzie, Greg G [GGMcKenzie@cbe.ab.ca]
Sent: Tuesday, April 11, 2006 12:51 PM
To: Roman Cooney; Donna Mastel
Cc: Dicer, Alice D
Subject: RE: Premier's Dinner

Roman,

Yes, I would be delighted to join such auspicious company. It sounds like a wonderful evening.

Greg

PS: I'm going to have to do some major working out to offset all all these invitations!

-----Original Message-----

From: Roman Cooney [mailto:rcooney@ucalgary.ca]
Sent: Tuesday, April 11, 2006 12:14 PM
To: McKenzie, Greg G; Donna Mastel
Subject:

Greg -- Would you like to join Dr. Weingarten and I (and a few others) at the University of Calgary's table at the Premier's Dinner April 20? We asked Brendan but he's at an Immigrants of Distinction Award dinner that night. (I know the group; I used to be on their Board). Let me know.

Roman

7.27 to 7.29

Severed under s. 17(1) and 17 (4)(g)

Included in the original disclosure package to Chief Electoral Office but ultimately determined to relate to personal expenditures

7.30

From: Roman Cooney <rcooney@ucalgary.ca>
Sent: Thursday, July 20, 2006 8:49 AM
To: Chen Fong
Subject: RE: Mar/Dinning

Hi Chen - Under the new tax rules the University cannot use public funds for political fundraising. However, I will personally buy a table as long as it's absolutely clear that it is personal and no University funds are being used, i.e. it has to be in my name. I can invite HPW to my table.
Roman

-----Original Message-----

From: Chen Fong [mailto:Chen.Fong@CalgaryHealthRegion.ca]
Sent: Wednesday, July 19, 2006 3:38 PM
To: rcooney@ucalgary.ca
Subject: Mar/Dinning

Hello Roman,

I got roped into selling tickets for the Gary Mar/Jim Dinnig Gala which is on Oct 12th.

Tickets are \$2,500 per table of 10 with \$2,250 being tax deductible.

Will need more than three names for the tax receipt as the max. on each receipt is \$1,000.

Will you and/or Harvey like a table?

Please advice. Thanks.

Chen Fong

P.S. I still remember our conversation over lunch after the first Gary Mar Gala.

7.31

From: Linda Barry-Hollowell, Q.C. [lbarryho@ucalgary.ca]
Sent: Tuesday, January 09, 2007 2:55 PM
To: Roman Cooney
Subject: [Fwd: Stelmach Event]

Do you need tickets? Linda

----- Original Message -----
Subject: Stelmach Event
Date: Tue, 9 Jan 2007 09:35:25 -0700
From: Loughheed, Joseph <Joseph.Loughheed@FMC-Law.com>
To: Linda Barry-Hollowell, Q.C. <lbarryho@ucalgary.ca>

Linda, you may want to chat with Roman to see if this is anything the U of C wants to get involved with.

JOE

-----Original Message-----
From: John Larsen <larsenconsulting@shaw.ca>
Date: Mon, 08 Jan 2007 19:39:37
To: johnlarsen@corpengroup.com
Subject:

Hello friends and business colleagues:

First and foremost, all the very best for a happy and prosperous 2007.

To those of you on this e-mail who provided your valued assistance and inputs during the recent PC leadership campaign, please accept my sincere thanks; I hope to be touching base with each of you individually in the weeks ahead. Today I wanted to let all of you know, if you haven't already heard through other channels, that there will be a great opportunity for you and your associates to meet our new Premier, the Honourable Ed Stelmach, and some of his Ministers, here in Calgary on the evening of January 18th, 2007.

A reception will be held in Ranahan's in the Grandstand at Stampede Park from 5:00 - 7:00 PM. Tickets to the reception are \$500.00 per person. There is also an opportunity to attend a smaller, more exclusive event prior to the above event for a minimum donation of \$5,000.00 (which also provides admission for two).

Both events will offer you and your colleagues an excellent opportunity to spend time with the new Premier, and Ministers, to discuss the issues the new Government will face in the run-up to the next election and to make them aware of some of your key issues. The purpose

7.32

From: Roman Cooney [rcooney@ucalgary.ca]
Sent: Thursday, August 02, 2007 1:09 PM
To: 5.17

Talked to Joe. You can go ahead and get those tix. Let's talk about how many.
RC

7:33

From: Roman Cooney [rcooney@ucalgary.ca]
Sent: Monday, August 27, 2007 10:56 AM
To: 'Lougheed, Joseph'
Subject: RE: Neil Brown's Fundraiser

We're in for as many as you think appropriate – I can get the bodies.
Neil really jumpstarted things for us last fall.
RC

From: Lougheed, Joseph [mailto:Joseph.Lougheed@FMC-Law.com]
Sent: Monday, August 27, 2007 10:24 AM
To: Roman Cooney
Subject: FW: Neil Brown's Fundraiser

Is the U of C interested?

Joseph P. Lougheed
Partner

FRASER MILNER CASGRAIN LLP
30th Floor
Fifth Avenue Place
237 - 4th Avenue S.W.
Calgary, AB T2P 4X7
(403) 268-6884 Direct Line
(403) 268-3100 Fax
joseph.lougheed@fmc-law.com

This message, and any documents attached hereto, is intended only for the addressee and may contain privileged or confidential information. Any unauthorized disclosure is strictly prohibited. If you have received this message in error, please notify us immediately so that we may correct our internal records. Please then delete the original message. Thank you.

From: Kristine Robidoux [mailto:info@complianceworks.ca]
Sent: Sunday, August 26, 2007 2:34 PM
To: Lougheed, Joseph
Subject: Neil Brown's Fundraiser

Hi Joe ... long time no speak. I

non-responsive

(MLA, Calgary Nose Hill) fundraiser, to be held Tuesday, October 30, 2007 from 5:30-7:30 p.m. at the Calgary Winter Club. The Guest Speaker is Premier Stelmach. The tickets are \$100, and a tax receipt will be issued for \$75.

Will you come? Can I bring you over a ticket? Do you want me to send over some tickets for others at FMC as well?

Kris
Kristine Robidoux, LL.B.
President

734

University Events - Government Attendance/ Political Events - University Attending
for the use of GR and External Relations
as at October 5th, 2006

n/r

7.35

Date and Time	Event and Location	University Community Invited and Roles	University Attending	Event Lead and Phone	Other Comments and Government Relations Role
Sept 28/06 5:30 - reception 6:30 - dinner	Harvey Cernaiko Dinner Ron Stevens speaker Treasures of China	Roman Cooney Donna Mastel Allison MacKenzie Cheryl McCarthy & Bruce McAslan Emily Wyatt Julie LaBonte Christine Johns	Roman Cooney Donna Mastel Allison MacKenzie Cheryl McCarthy & Bruce McAslan Matthew Fox Shauna Coffyne		

n/r

7.36

n/r

Notes from conversation between Donna Mastel and Brian Wik.
January 13, 2009

n/r

- 5) Premier's Dinner Calgary – April 2. Brian should be in Calgary for this event.

n/r

7:37

n/r

Brian's travel schedule to Calgary

April 1 & 2 - Calgary Premier's Dinner and campus meetings

n/r

7-38

n/r

Notes from conversation between Donna Mastel and Brian Wilc
January 20, 2009

Formatted: Height: 11"

n/r

4) Premier's Dinner Calgary - April 2. Await attendee list from President.

n/r

7.39

n/r

April 1 & 2 - Calgary Premier's Dinner and campus meetings.

n/r

Cardholder Activity

Print | Close

Name: [REDACTED]

n/r



8/20/2007

P.C. ASSOCIATION OF ALTA
EDMONTON AB

\$450.00
UCALC

10-81010-60175-000000000 -

\$25.47

\$0.00

M

False

450.00

Dinner with the Premier-table for 8

Processed in error. Refund
Sent by cheque

n/r

7.41

Processed in
error. Refund
attached

Dinner With the Premier

July 12, 2007

\$ 450.50

Please reserve and send 8 tickets at \$60 or a table of 8 for \$450 to:Name: University of Calgary, attn Donna MastelAddress: A113, 2500 University Dr. NW.City Calgary Postal Code T2N 1N4Telephone (day) 220-8567 (eve) 220-8363

Guest Names:

Donna Mastel

_____The rest of the
names are to follow.

_____Cheque enclosed (made payable to Airdrie-Chestermere PC Association)
OR

10-81010-60175

VISA Mastercard
Card number 5.17(11)
Expiry Date _____
Signature Denise Punt

A tax receipt will be issued for each ticket.
(Please indicate the name you would like to appear on the tax receipt)

Please order by June 21, 2007

If you have any questions please contact us:

Susan Young @ (403) 948-0135 or Ada Rawlins @ (403) 272-0498

Mail Reply to:

Premier's Dinner Tickets, PO Box 5317, Airdrie, AB T4B 2T9

Fax reply to (credit cards only):

(403) 948-3201

#161-166
#161-177

Allan LePoudre CFP, CLU, B.Sc.Ag.
SUN LIFE FINANCIAL
Box 5317, 213 Main Street North
Airdrie AB T4B 2T9



Bus: 403 912-0544

Fax: 403 948-3201

Email: allan.lepoudre@sunlife.com

Advisor Assistant: Lorna LePoudre

Bus: 403 912-0120

Email: lorna.lepoudre@sunlife.com

Date: AUGUST 30TH
To: DENISE PUNT
Fax number: 220-1312
From: ALLAN LEPOUDRE
Phone: 912-0544
No. of pages: 2
(including cover)
Message: VISA RECEIPT FOR
PREMIERS DINNERS
ADRIENNE-CHRISTINE P.C.
ASSO.

Fax

This communication is intended for the addressee and may contain information that is privileged, confidential or exempt from disclosure under law. If you are not the addressee or someone responsible for delivering the communication to the addressee, please be aware that any use, dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us immediately by telephone and return the original to us at the address noted above.

Sun Life Financial products are issued and underwritten by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.

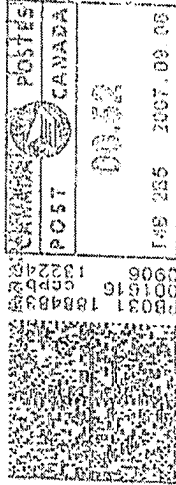
Sun
Life Financial

Allan LePoudre, CFP, CMA, ACF, ACF
Allan LePoudre Financial Services Ltd.
213 Main Street North
PO Box 3317
Airdrie, AB T4B 2T9

CONFIDENTIAL

Donna Mastel
Director, Government Relations
Office of External Relations
University of Calgary
Administration Building 113
2500 University Drive NW
Calgary AB T2N 1N4

070207 0135 T2E 0A0 084 1111111



Refund

7.43

AIRDRIE CHESTERMERE P.C. ASSOC.

0049

DATE 06 09 2007
D M Y Y Y

\$ 450.00

100 DOLLARS
100

AIRDRIE CHESTERMERE P.C. ASSOC.



ROYAL BANK OF CANADA
P.O. BOX 3459
100 MAIN STREET
AIRDRIE, ALBERTA T4B 2B7

RE REFUND - AIRDRIE - CHESTERMERE 10502005

5.16(17)

PER *Donna Mastel*
A. LePoudre

7-44

Allan LePoudre CFP, CLU, B.Sc. Ag.
SUN LIFE FINANCIAL
Box 5317, 213 Main Street North
Airdrie AB T4B 2T9



Bus: 403 912-0544

Fax: 403 948-3201

Email: allan.lepoudre@sunlife.comAdvisor Assistant: Lorna LePoudre
Bus: 403 912-0120Email: lorna.lepoudre@sunlife.com

Date: AUGUST 30TH
To: DENISE PUNT
Fax number: 220-1312
From: ALLAN LEPOUDRE
Phone: 912-0544
No. of pages: 2
(including cover)
Message: VISA RECEIPT FOR
PREMIERS DINNER
ANDERSON-CHASTERTON P.C.
ASSO.

Fax

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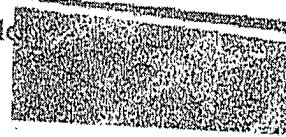
Transaction Summary



Page 1 of 1

7-45

Consumer Challenged



Amount	Type	Changed
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n/r

<input type="checkbox"/>	Details	8/20/2007	P.C. ASSOCIATION OF ALTA	450.00	\$450.00	\$450.00	M	No
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n/r

Dinner with the Premier

7-46

Subject: Dinner with the Premier
From: "Donna Mastel" <donna.mastel@ucalgary.ca>
Date: Wed, 11 Jul 2007 13:14:59 -0600
To: "Lisa Fiege" <lisa@solarcalgary.org>, "Jeff LaFrenz" <jeff.lafrenz@ucalgary.ca>, "Fran Jamison"
S.17(1)
CC: "Denise Punt" <dpunt@ucalgary.ca>, "Donna Mastel" <donna.mastel@ucalgary.ca>

Hi All,

Thank you for agreeing to be part of the UofC table for the Airdrie-Chestermere PC Association Dinner with the Premier.

Our UofC table includes:

Mark Blackwell, President, ISEEE Students Association
Len Bykowski, President & CEO, BioProducts Alberta and his wife, Sheila
Colin Dalton, guest of Jeff LaFrenz
Lisa Fiege, Project Coordinator, Alberta Solar Decathlon Project
Fran Jamison, Member of UofC Senate
Jeff LaFrenz, Project Manager, UofC
Randy Mabbot, Member of UofC Senate

Keith Jones, one of our Senators will be at a table close by and will try and bring the Premier over to meet members at our table.

He has also sent me directions to the event - enclosed below. He also indicated the event is sold out and if, at the last minute, you cannot attend, please call him on his cell as they have a waiting list. His cell -
S.17(1)

Directions - To get to the Airdrie Town and Country centre, drive north on Hwy 2 to the third Airdrie exit (the northern exit), then go west over highway 2 to the first set of lights. Turn left (south), and as you drive south you'll see the United Farmers of Alberta store just to the right. The T&C centre is just west of the UFA store.

If you have any questions, give me a call.

Have a great evening.

Donna

Donna Mastel
Director, Government Relations
Office of External Relations
University of Calgary
Administration Building 113
2500 University Drive, N.W.
Calgary, Alberta
T2N 1N4

Phone: (403) 220-8567
Cell: (403) 540-3612
Fax: (403) 220-1312
e-mail: donna.mastel@ucalgary.ca

Re: Dinner with the Premier

7-47

Subject: Re: Dinner with the Premier
From: Anna Wagner <alwagner@ucalgary.ca>
Date: Fri, 22 Jun 2007 14:09:56 -0600
CC: Denise Punt <dpunt@ucalgary.ca>

Dr. Cribb is in Ottawa this week, and sends his regrets.

Donna Mastel wrote:

Hi Anna,

As discussed, we would like to invite the Dean and a guest to attend the Airdrie-Chestermere PC Association Dinner with the Premier.

Details:

Thursday, July 12th
Town & Country Centre, 275 Jensen Drive NE, Airdrie
cocktails - 6:30 pm
Dinner - 7:00 pm

Premier Ed Stelmach will be speaking. MLA Carol Haley will be hosting the event.

If the Dean is able to attend, kindly contact Denise Punt as I will be away from the office until July 3rd.

Once we have the table filled, I will forward names of all attendees.

Thanks
Donna

Donna Mastel
Director, Government Relations
Office of External Relations
University of Calgary
Administration Building 113
2500 University Drive, N.W.
Calgary, Alberta
T2N 1N4

Phone: (403) 220-8567
Cell: (403) 540-3612
Fax: (403) 220-1312
e-mail: donna.mastel@ucalgary.ca <<mailto:donna.mastel@ucalgary.ca>>

--
Anna Wagner
Executive Assistant to the Dean
Faculty of Veterinary Medicine

FW: Premier's Dinner in Airdrie July 12

7-48

Subject: FW: Premier's Dinner in Airdrie July 12
From: "Roman Cooney" <rcooney@ucalgary.ca>
Date: Fri, 8 Jun 2007 13:57:07 -0600
To: "Denise Punt" <dpunt@ucalgary.ca>

From: Roman Cooney [mailto:rcooney@ucalgary.ca]
Sent: Friday, June 08, 2007 1:57 PM
To: 'Keith Jones'; 'donna.mastel@ucalgary.ca'; 'donna.mastel@ucalgary.ca'
Subject: RE: Premier's Dinner in Airdrie July 12

Thanks, Keith

Kathy/Donna – we should have a table at this event.
Kathy please do the paperwork attached with Keith's note and when Donna gets back she can work on filling up the table.
Donna, unfortunately I will be in Victoria, but please make sure we are represented. I will send an invitation to Board's and Senate and students on Monday in the meantime so we can get the ball rolling. Denise please keep track so Donna knows where we're at when she returns.

Thanks,

RC

From: Keith Jones [mailto:kjones@biotrendenergy.com]
Sent: Friday, June 08, 2007 8:26 AM
To: dpunt@ucalgary.ca
Subject: FW: Premier's Dinner in Airdrie July 12

Denise, I understand that Donna is out of the office until June 21. Could you forward this to Roman (I don't have his correct email address) and discuss it with him?

Thanks,
Keith

Keith Jones
Director
BTE Biotrend Energy Inc.
403-293-9497
Fax 403-590-7834
kjones@biotrendenergy.com

From: Keith Jones [mailto:kjones@biotrendenergy.com]
Sent: June 8, 2007 7:55 AM
To: 'roman.cooney@ucalgary.ca'
Cc: 'Donna Mastel'
Subject: Premier's Dinner in Airdrie July 12

Roman, it was good to see you again at the Senate orientation meeting. As I mentioned, the Airdrie-Chestermere PC Association is hosting their Premier's Dinner at the Airdrie Town and Country Centre on Thursday, July 12. They are holding the dinner following their AGM, and they are selling a maximum of 360 tickets. It might be worthwhile for the UofC to purchase a table for the dinner, if you feel it is appropriate. I

FW: Premier's Dinner in Airdrie July 12

7.49

have attached the ticket request form for the event.

All the best,

Keith Jones

Director

BTE Biotrend Energy Inc.

403-293-9497

Fax 403-590-7834

kjones@biotrendenergy.com

From: Hunter, Clarke
Sent: March 19, 2012 2:45 PM
To: 'brian.fjeldheim@elections.ab.ca'
Cc: 'Pat Peacock'; N/R
Subject: UNIVERSITY OF CALGARY
Attachments: MACLEOD-#1898543-v1-ADDITIONAL_EMAILS.PDF

Dear Mr. Fjeldheim:

Further to my transmittal of February 17, 2012, as a result of some additional searching the University has located three additional email records which are pertinent to this matter, and I attach copies.

Regards
Clarke Hunter

Clarke Hunter, Q.C.
Partner

Norton Rose Canada LLP / S.E.N.C.R.L., s.r.l.
400-3rd Avenue SW, Suite 3700, Calgary, Alberta T2P 4H2 Canada
T: +1 403.267.8292 | F: +1 403.264.5973
Clarke.Hunter@nortonrose.com

From: Hunter, Clarke
Sent: February 17, 2012 3:35 PM
To: 'brian.fjeldheim@elections.ab.ca'
Cc: Pat Peacock; N/R
Subject: UNIVERSITY OF CALGARY

Dear Mr. Fjeldheim:

Further to my telephone advice to you earlier today, the materials enclosed herewith are in response to your letter of January 13, 2012 to the University of Calgary, addressed to Douglas Black as the Chair of its Board of Governors, and copied to Dr. Elizabeth Cannon as its President and Vice-Chancellor. A further copy of these materials is being couriered to you over the weekend in hard copy.

As you know from the telephone conversation which Pat Peacock and the writer had with you on February 15, I represent the University and Mr. Peacock represents the law firm of Fraser Milner Casgrain and one of its partners, Joe Lougheed.

We advised you in that call that the University would in the near future be providing you with materials for your evaluation in connection with the investigation which has been reported in the media. Fraser Milner Casgrain and Mr. Lougheed have concurred that these materials should be made available for your review.

You will note that the materials consist of a volume of University records, as well as a statement which has been provided by Mr. Lougheed to the University. We are forwarding the latter as part of the package on the basis that it is additional information which has been provided to the University, but it is a statement of Mr. Lougheed rather than of any University official.

We look forward to hearing from you should you have questions concerning the materials.

Yours truly
Clarke Hunter

Clarke Hunter, Q.C.
Partner

1-51
Norton Rose Canada LLP / S.E.N.C.R.L., s.r.l.
400 3rd Avenue SW, Suite 3700, Calgary, Alberta T2P 4H2, Canada
T: +1 403.267.8292 | F: +1 403.264.5973
Clarke.Hunter@nortonrose.com

From: Loughheed, Joseph <Joseph.Loughheed@FMC-Law.com>
 Sent: Monday, August 18, 2008 2:39 PM
 To: Charlene Anderson
 Subject: RE: March FMC Bill

I am also speaking to Roman at 3pm on this and other matters. Obviously my intention is NOT in any way to put the University in harms way. Can we chat? What is your direct line? Email makes this conversation difficult.

I think the issue is charging back the University; FMC regularly does buy two tables to this event. One question then, can we invite you as our guests at one table, as long as we do NOT in any way charge it back or expect payment for it? My reading (re-reading) of the Legislation would appear to indicate that is ok. You can attend as guests.

Anyway, lets actually speak. I am at my desk.

Joe

-----Original Message-----

From: Charlene Anderson [mailto:cande@ucalgary.ca]
 Sent: Monday, August 18, 2008 2:28 PM
 To: Loughheed, Joseph
 Subject: Re: March FMC Bill

Joe, I will follow up with Roman and 5.17 privately regarding these emails but I am concerned that your email left the impression that my interpretation was 'splitting hairs'. Your initial email below was clear that you were buying a table on our behalf b/c we were prevented from doing so and that you would bill us an equivalent amt as 'fees' in exchange for this table. You were not billing us for your time. I have reviewed the _Elections Finances and Contribution Disclosure Act _which specifically prohibits the University from contributing funds to a party or candidate (set out below). This Act also prohibits another entity from making these contributions on our behalf. In addition, CRA also has prohibitions. So I stand by my very real concern that this practice is illegal and is unacceptable.

Prohibition

s. 16. No prohibited corporation, person normally resident outside Alberta or trade union or employee organization other than a trade union or employee organization as defined in this Act shall make any contributions to a registered party, registered constituency association or registered candidate.

(l) "prohibited corporation" means

(v) a public post-secondary institution under the /Post-secondary Learning Act/,

Contributions not belonging to contributor

34*(1)* Subject to section 26, no person, corporation, trade union or employee organization shall contribute to any registered party, registered constituency association or registered candidate funds not actually belonging to that person, corporation, trade union or employee

organization, or any funds that have been given or furnished to the person, corporation, trade union or employee organization by any persons or groups of persons or by a corporation, trade union or employee organization for the purpose of making a contribution of those funds to that registered party, registered constituency association or registered candidate.

Offences by corporations, etc.

49*(1)* A corporation, trade union, employee organization or prohibited corporation that contravenes this Act is guilty of an offence and liable to a fine of not more than \$10 000.

Lougheed, Joseph wrote:

>Thanks for your views on this Charlene. I do not think it is fair to
>say services were and are not rendered; I am at the event every year and
>at the functions the come before and after it. This time is beneficial
>to the University's overall realtionship with the Government and in the
>introductions made.

>

>In any event, I do not want to split hairs nor debate the issue, but I
>respect your views. Roman and I shall deal with this.

>

>Have a good weekend.

>

>JOE

>

>-----Original Message-----

>From: Charlene Anderson [mailto:cande@ucalgary.ca]

>Sent: Thursday, August 14, 2008 1:25 PM

>To: Lougheed, Joseph

>Cc: Anagnostakos, Leah; **S.17**; Roman Cooney

>Subject: Re: March FMC Bill

>

>Joe, I think there may have been some confusion about the accounts, as I

>

>had thought this March acct had been dealt with some time ago. You are

>correct that this is the first time this 'practice' has been questioned

>by me. However, I questioned (and objected to) it, the moment I became

>aware of it. I cannot pay this account nor can I condone this practice.

>

>This practice, in my opinion, exposes the University to unnecessary

>risks - legally, financially and reputationally. The University cannot

>pay for services that were not rendered, nor should we circumvent the

>rules that preclude us from buying a table. I will leave it up to you

>and Roman to resolve this. tx

>

>Lougheed, Joseph wrote:

>

>
>
>>Charlene, your office is questioning a bill issued on March 31 and
>>
>>
>\$4500
>
>
>>in my time re: U of C "Assist **6.17** re: Government Relations
>>matters".
>>
>>You know that in June I was retained by External Relations to provide
>>some GR advice. I bill Roman for that directly. The above is NOT part
>>of that.
>>
>>The bill in question relates to the Premier's Dinner. As the U of C is
>>precluded from buying the table directly, we buy the table for the U of
>>C write off the disbursement and then simply charge for an equivalent
>>amount of time. This is a practice which we have followed for a couple
>>of years now. This is the first time this has been questioned by you.
>>
>>If Legal Services does not want to pay this that is fine - I understand
>>your budget is tight, but it is separate and apart from my normal
>>retainer for GR matters. If **6.17** and Roman wish to have this come out
>>of their budget vs. you in yours I leave that to you as a group to
>>decide. I will simply move the time (\$4500) over and add it to the
>>
>>
>next
>
>
>>GR bill.
>>
>>Let me know if you have any questions and / or how you would like me to
>>proceed.
>>
>>Hope all is well,
>>
>>JOE
>>
>>
>>
>>
>>
>>
>
>
>

--
Charlene Anderson
General Counsel

University Legal Services

Tel: (403) 220-2557

Fax: (403) 210-9635

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From: Roman Cooney <rcooney@ucalgary.ca>
Sent: Monday, August 18, 2008 3:30 PM
To: Charlene Anderson; Joe Lougheed
Cc: **S.17**
Subject: Re: March FMC Bill - privileged

Charlene -- I don't think Joe was intending to downplay your concerns. Part of the uncertainty around this is that Linda felt that, given the broader political work associated with these events, which is considerable, that the billing was appropriate. I accepted her advice. You clearly disagree, and you are the University's general counsel. I'll take your advice and we will, in future and including the event earlier this year, ensure the University does not directly or indirectly pay for these events.

Thanks,

Roman

Charlene Anderson wrote:

- > Roman and **S.17**, I will follow up separately with Joe on this. As you
- > might imagine, I am concerned that Joe set this out in writing. I am
- > also concerned that he's implying that I am merely 'splitting hairs'
- > here. So for your information, I am providing you with excerpts from
- > the Elections Finances and Contribution Disclosure Act which
- > specifically prohibits the University from contributing funds to a
- > party or candidate. This Act also prohibits FMC from making these
- > contributions on our behalf.
- >
- > In addition, a registered charity is also prohibited from contributing
- > to a political party by CRA.
- >
- > Prohibition
- >
- > s. 16. No prohibited corporation, person normally resident outside
- > Alberta or trade union or employee organization other than a trade
- > union or employee organization as defined in this Act shall make any
- > contributions to a registered party, registered constituency
- > association or registered candidate.
- >
- > (l) "prohibited corporation" means
- >
- > (v) a public post-secondary institution under the /Post-secondary
- > Learning Act/,
- >
- >
- > Contributions not belonging to contributor

>
 > 34*(1)* Subject to section 26, no person, corporation, trade union or
 > employee organization shall contribute to any registered party,
 > registered constituency association or registered candidate funds not
 > actually belonging to that person, corporation, trade union or
 > employee organization, or any funds that have been given or furnished
 > to the person, corporation, trade union or employee organization by
 > any persons or groups of persons or by a corporation, trade union or
 > employee organization for the purpose of making a contribution of
 > those funds to that registered party, registered constituency
 > association or registered candidate.

>
 >
 > Offences by corporations, etc.

>
 > 49*(1)* A corporation, trade union, employee organization or
 > prohibited corporation that contravenes this Act is guilty of an
 > offence and liable to a fine of not more than \$10 000.

>
 >
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 > Loughheed, Joseph wrote:

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 >> and at the functions the come before and after it. This time is
 >> beneficial to the University's overall relationship with the
 >> Government and in the introductions made.

>>
 >> In any event, I do not want to split hairs nor debate the issue, but
 >> I respect your views. Roman and I shall deal with this.

>>
 >> Have a good weekend.

>>
 >> JOE

>>
 >> -----Original Message-----

>> From: Charlene Anderson [mailto:cande@ucalgary.ca] Sent: Thursday,
 >> August 14, 2008 1:25 PM

>> To: Loughheed, Joseph

>> Cc: Anagnostakos, Leah; 5.17 Roman Cooney

>> Subject: Re: March FMC Bill

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 >> Joe, I think there may have been some confusion about the accounts,
 >> as I

>>
 >> had thought this March acct had been dealt with some time ago. You
 >> are correct that this is the first time this 'practice' has been
 >> questioned by me. However, I questioned (and objected to) it, the
 >> moment I became aware of it. I cannot pay this account nor can I
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>> This practice, in my opinion, exposes the University to unnecessary
 >> risks - legally, financially and reputationally. The University
 >> cannot pay for services that were not rendered, nor should we
 >> circumvent the rules that preclude us from buying a table. I will
 >> leave it up to you and Roman to resolve this. tx

>> Loughheed, Joseph wrote:

>>

>>

>>

>>> Charlene, your office is questioning a bill issued on March 31 and

>>>

>> \$4500

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>>> in my time re: U of C "Assist **S.17** re: Government Relations
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 >>> equivalent amount of time. This is a practice which we have
 >>> followed for a couple of years now. This is the first time this has been questioned by you.

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>>> If Legal Services does not want to pay this that is fine - I
 >>> understand your budget is tight, but it is separate and apart from
 >>> my normal retainer for GR matters. If **S.17** and Roman wish to have
 >>> this come out of their budget vs. you in yours I leave that to you
 >>> as a group to decide. I will simply move the time (\$4500) over and
 >>> add it to the

>>>

>> next

>>

>>

>>> GR bill.

>>>

>>> Let me know if you have any questions and / or how you would like me
 >>> to proceed.

>>>

>>> Hope all is well,

>>> JOE

>>>

>>>

>>>

>>>

>>>

>>

>>

From: Loughheed, Joseph <Joseph.Loughheed@FMC-Law.com>
Sent: Monday, August 18, 2008 3:33 PM
To: Charlene Anderson
Cc: Roman Cooney
Subject: Discussion with Roman

Charlene, I just discussed this with Roman. Linda and I were ok with this arrangement and the interpretation of the law (although we both agreed at the time it was subject to some debate) and on that basis we went ahead. You are not which I fully respect. On the basis of your concerns, we will cease this practice, effectively immediately. Roman may discuss with you directly.

I would still like to have a brief conversation with you when you can chat. We will be writing off the March account.

Joe